



State of Wisconsin Department of Public Instruction

Elizabeth Burmaster, State Superintendent

DATE: April 22, 2008

TO: School District Administrators

FROM: David Carlson, Director
School Financial Services Team

RE: Common School Fund Payment
Expanded Use of the Common School Fund
New PI 5000 Transfer of Service Internet Application
Professional Staff Eligibility for Special Education Categorical Aid
Upcoming Mailings and Important Dates

Please route this information to appropriate district staff.

Common School Fund Payment

Districts will receive their common school fund (library aid payment) on Monday, April 28. Payment information is located under "Aid Information" on the left hand scan bar on the finance team's website or directly at <http://www.dpi.wi.gov/sfs/comsch.html>. The payment amount is the same that was communicated to districts in a letter dated January 3, 2008. The letter is located under "Mailings" on the left hand scan bar or directly at http://www.dpi.wi.gov/sfs/pdf/1_3_08JanuaryPupilCountEtc.pdf.

Reminder: Districts are required to spend their aid on library related expenditures in the same fiscal year in which they receive the aid.

Expanded Use of the Common School Fund

With passage of the state budget in October 2007, s. 43.70(3), Wis. Stats., the guided use of the Common School Fund was amended. With the amendment, school districts may now use up to 25 percent of the [CSF] moneys received in a fiscal year to purchase school library computers and related software to be housed in the school library. These purchases must be made in consultation with the school district's library media coordinator, as per PI 8.01(2)(h), Wisconsin Administrative Code.

As a result of the expanded use of the common school fund to purchase computers, districts have inquired about utilizing the payment schedule of a lease/purchase agreement as appropriate for common school fund expenditure for library computers. It has been determined that this is an appropriate use of the common school fund revenue provided the district complies with the following requirements:

A letter is sent to the school finance team, attention Brad Adams, indicating that the district is electing to use the lease/purchase option to acquire computers for the school library. The letter should be co-signed by the school district administrator or designee and the district's library media specialist. Attach a copy of the lease/purchase plan agreement with the principal and interest payment schedule and a statement indicating the percentage of computers in the purchase agreement that is for the library.

It should be understood that there is no guarantee that the library aid amount allowed for library computer purchases will remain at the current level. The district may have to supplement the lease/purchase yearly payment should the 25 percent of eligibility be insufficient.

New PI 5000 Transfer of Service Internet Application – Opens Monday, April 28.

For 2008-09 requests, districts will have the option of completing an internet based Transfer of Service (TOS) exemption application form. Districts may also choose to complete the Excel form and submit a paper copy. However, districts are encouraged to use the Internet application. The due date for the submission of paper copy requests is July 1. The due date for the new Internet based application requests is August 1. Additionally, if a requesting district files electronically, the district who is required to complete Part B will also file the Part B electronically. Information to complete both the paper and internet applications is available under the “Transfer of Service” link on the left hand scan bar on the team’s home web page or directly at <http://dpi.wi.gov/sfs/transerv.html>. Below is an outline of the new Internet application process.

1. Before accessing the Internet application, district staff should gather the information they need to complete a request such as student information and an estimate of cost data.
2. Districts will then access the report on line by first going to the district’s reporting home page by selecting the SAFR Reporting Portal link on the finance team’s home web page located directly at <https://www2.dpi.state.wi.us/safr/>. The PI 5000 Transfer of Service report is located on the list of reports under the “Financial Data Home” link. This link will take the district to the Transfer of Service “dashboard” home page.
3. Using the options on the horizontal scan bar at the top of the page, the district will enter the TOS request information. It uses a “wizard” approach in which the district responds to questions by entering data.
4. When finished, districts will return to the TOS home “dashboard” page. It is on this page that districts will over time be able to view the status of their requests. Districts will note that requests for information have been automatically sent to the district from which the student came (if applicable, known as “Part B”). Also on this page will be notification that other districts have requested your district to complete a Part B for a student who has left your district. Please respond to these requests as quickly as possible by selecting the “Part B” scan bar link. The dashboard will have “gauges” that will allow your district to quickly review the status of the TOS requests.
5. TOS information will also appear on the SAFR “Status and Due Dates” report summary page. Districts that have filed a TOS request will see that information displayed. “Part B” request status information will also be displayed to alert your district that a “Part B” request has been filed and your district is required to respond.
6. After all district requests have been confirmed by the prior district (Part B), the district will complete a summary report listing new costs and added staff. This step must be completed before the department will approve any TOS exemptions that are recorded on line 8B of the district’s revenue limit calculation.

It is imperative that districts identify a TOS contact person. Complete the following process to review the name of your district contact and amend if needed: In the Reporting Portal <https://www2.dpi.state.wi.us/safr/> - navigate to your district (password will be needed). On the left side scan bar, click on "District Contacts." You can then choose a name to amend or click "Add a Contact." Following the contact information at the end of the page will be options for identifying that individual as a special education contact, an LEP contact, contact for both, or contact for none. Choose "None" if you wish to remove them as a TOS contact. As stated above, all TOS contacts will receive an e-mail alerting them of a district request for verification (TOS Part B).

Professional Staff Eligibility for Special Education Categorical Aid

On Monday, April 7, the Governor signed AB 906 into law as Act 221. This new law requires the department to establish rules that identify the percentages of psychologist, social worker, guidance counselor and school nurse salaries that are eligible for special education categorical aid. Currently, districts are required to maintain documentation such as time studies to determine percentages of salaries of these staff. Because of Act 221, districts will no longer be required to develop and maintain these records. Act 221 is located on the internet at <http://www.legis.state.wi.us/>.

The department will be developing emergency rules because the computation of special education aid paid in 2008-09 based upon 2007-08 costs will incorporate this new law. The department will be proposing the following percentages of staff salary as special education categorical aid eligible: social worker – 59 percent, guidance counselor – 10 percent, school nurse – 29 percent and psychologist – 84 percent. The basis for the percentages is the result of an analysis of these professional staff salaries as reported on the 2005-06 and 2006-07 PI 1505 Annual and PI 1505 SE Annual Reports. It should be noted that as part of the rule making process, districts will have the opportunity to comment upon the proposed rule by providing testimony at a public hearing. The date and time of the hearing will be determined later and will be announced on the finance team's listserve.

Upcoming Mailings and Important Dates

| Date | Event |
|----------|--|
| April 28 | Common School Fund Payment |
| May 19 | Children at Risk Payment |
| May 23 | Letter to Districts: Final 2007-2008 Revenue Limit Calculation, Final 2007-08 General Aid Eligibility, Final 2007-08 Special Education Aid Eligibility, 2007 School Aid (Spring) Equalized Values, 2007-2008 PI 1589 Group and Foster Home Reporting Instructions, PI 1505 Calendar Reporting Instructions, PI 1804/1805 2008 Summer School Reporting Instructions, 2007-08 PI 1547 Transportation Report Reminder |
| June 2 | State Tuition Payment |
| June 9 | SPED/SAGE Payment |
| June 12 | Letter to Districts: Calculation of Remaining School District Aid Payments Worksheet for 2007-08, Public School Open Enrollment Participation Summary Worksheets for 2007-08, Reporting Instructions for the 2007-08 PI 1505 AC (Aid Certification) Report, PI 1505 Annual Report, PI 1505 Census Report, PI 1505 SE - Special Education Annual Report, PI 1524 State Tuition Claims, PI 1570 High Cost Special Education Aid Report |
| June 16 | Equalization/Special Adj Payment/Special Transfer/CCDEB/High Cost SPED Payments |
| June 23 | SAGE Debt Service Payment |
| June 30 | Letter to Districts: 2008-09 July 1 General Aid Estimate, 2008-09 Revenue Limit Calculation Estimate |
| July 28 | 2007-08 Delayed Equalization Aid Payment, Computer Aid Payment |

The School Financial Services Team home web page is located at <http://www.dpi.wi.gov/sfs/index.html>.

Please contact one of the following School Financial Services Team consultants should you have questions:

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| Brad Adams | (608) 267-3752 | bradley.adams@dpi.state.wi.us |
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